

PPM Tool Roles and Responsibilities Matrix

Project Portfolio Management (PPM) Application Portfolio Management (APM)

User Roles	Contributor <sup>2</sup>	PMO	Agency Reviewer	Agency Approver	Agency Application Reviewer <sup>3</sup>	Project Reviewer	State Reviewer	State Approver	State CIO (Final approver)
Summary Description of Role <sup>1</sup>	Contributors will have the ability to create/update both projects and applications that they are specifically assigned to. Agency Project Managers typically belong to this role.	PMOs role will have the ability to create/update projects, programs and applications that they are specifically assigned to. In addition, PMOs will have view access to their assigned agency's full inventory of projects, programs and applications	Agency Reviewers will have view access to their assigned agency's full inventory of projects and applications. They serve as reviewers in the project status reporting and approval process. Agency PMO, Architecture, Security & Budget personnel typically belong to this role.	Agency Approver rights are similar to those of Agency Reviewers, but they are required to approve/reject (sign-off) projects before they can move forward in the workflow. Agency CIO's & CFO's belong to this role.	Application Reviewers have the ability to view applications and run reports on the agency's application inventory. Similar to the Agency Reviewer role, but for users who have access to only applications, not projects.	Project Reviewers will have view access to the State's full inventory of projects, programs and applications. State Oversight - OSA and Fiscal Research typically belong to this role. Other agency personnel may also be assigned.	State Reviewers will have view access to the State's full inventory of projects and applications. They serve as reviewers in the project status reporting and approval process. State Oversight - Budget Analysts, EPMO, & Architecture and Engineering users typically belong to this role.	State Approver rights are similar to those of State Reviewers, but they are required to approve/reject (sign-off) projects before they can move forward in the workflow. State Oversight Leaders - Director of EPMO, OSBM, OSC, Statewide Architecture and Engineering belong to this role.	Similar to State Approver rights, the State CIO role will have access to the State's portfolio of projects and applications and be the final project approvers in each workflow phase. State CIO & DCIO belong to this role.
User Rights - Projects <sup>4</sup>									
Create a new project	Yes	Yes	No	No	No	No	No	No	No
Edit project data	Yes, entire project	Yes, entire project	Yes, but limited to Issues & Risks and Document Management Tabs	Yes, but limited to Issues & Risks and Document Management Tabs	No	No	Yes, but limited to Issues & Risks and Document Management Tabs	Yes, but limited to Issues & Risks and Document Management Tabs	Yes, but limited to Issues & Risks and Document Management Tabs
Delete project data	Yes—all contributors can add or delete	Yes—all contributors can add or delete	No	No	No	No	No	No	No
View all projects within an agency	Yes, if assigned	Yes	Yes	Yes	No	Yes, if assigned	Yes	Yes	Yes
Required to act before project moves forward in workflow	Yes—all contributors must approve before the project can move forward.	Yes—all contributors must approve before the project can move forward.	No	Yes	No	No	No	Yes	Yes
Enter comments during workflow approval	Yes	Yes	No	Yes	No	No	No	Yes	Yes
Receive notification when a project is moved to an approval state requiring signoff	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Yes
Run project level reports	Yes, for assigned projects	Yes, for assigned projects	Yes, for all projects in assigned agency	Yes, for all projects in assigned agency	No	Yes, for assigned projects	Yes, for all projects in State of NC	Yes, for all projects in State of NC	Yes, for all projects in State of NC
Run portfolio level reports (for projects)	No	Yes	Yes, for all projects in assigned agency	Yes, for all projects in assigned agency	No	No	Yes, for all projects in State of NC	Yes, for all projects in State of NC	Yes, for all projects in State of NC
Delete Projects	No	No	No	No	No	No	No	No	No
User Rights - Programs									
Create a new program	No	Yes	No	No	No	No	No	No	No
Edit program data	No	Yes, if added as a Contributor to the program	Yes. Limited to Issues and Risks	Yes. Limited to Issues and Risks	No	No	Yes. Limited to Issues and Risks	Yes. Limited to Issues and Risks	Yes. Limited to Issues and Risks
Delete program data	No	Yes, if added as a Contributor to the program	No	No	No	No	No	No	No
View all programs within an agency	No, only if assigned	Yes	Yes	Yes	No	No, only if assigned	Yes	Yes	Yes
Run program level reports	No, only if assigned	Yes	Yes	Yes	No	No, only if assigned	Yes	Yes	Yes
Delete programs	No	No	No	No	No	No	No	No	No
User Rights - Applications									
Create a new application	Yes	Yes	No	No	No	No	No	No	No
Edit application data	Yes, entire application	Yes, entire application	Yes, but limited to Document Management Tab	Yes, but limited to Document Management Tab	Yes, but limited to Document Management Tab	No	Yes, but limited to Document Management Tab	Yes, but limited to Document Management Tab	Yes, but limited to Document Management Tab
Delete application data	Yes, all assigned contributors can add or delete data	Yes, all assigned contributors can add or delete data	No	No	No	No	No	No	No
View all applications within an agency	No, only if assigned	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes
Run portfolio level reports (for applications)	No	Yes, for all applications in assigned agency	Yes, for all applications in assigned agency	Yes, for all applications in assigned agency	Yes, for all applications in assigned agency	No	Yes, for all applications in State of NC	Yes, for all applications in State of NC	Yes, for all applications in State of NC
Delete applications	No	No	No	No	No	No	No	No	No

1: Full description of user roles contained in PPM Tool Roles & Responsibilities document

2: User rights for contributors only apply if they are assigned to specific applications or projects

3: New user role for Application Portfolio Management. Created for Agency users who only require access to applications, not projects.

4: Edit, Review & Approval user rights for projects will also be applicable for Expansion Budget Requests